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Western Arctic

Tourism Strategy

Draft Volume 8

FORT NORMAN

Western Arctic Visitors Association
Economic Development and Tourism

MacLAREN F ·NSEARCH
PELMAN ASSOCIATES ARCHITECTS
ADDISON TRAVEL MARKETING
88-05 40313

Lavalin

PREFACE

In the fall of 1986, the Western Arctic Visitors Association commissioned the consortium of Pelman Architects, MacLaren Plansearch and Addison Travel Marketing to prepare a comprehensive tourism development and marketing strategy. The consultants were also asked to prepare architectural plans for a proposed WAVA Visitors Centre and a conceptual development scheme for the Dempster Highway.

The study was funded under the Economic Development Agreement and overseen by the Department of Economic Development and Tourism.

The goals of the study were to create an action oriented plan that will achieve the following:

- o increase awareness of the long term potential of the tourism industry;
- o develop a commitment by both individual operators and communities as to becoming involved in tourism; and
- o to identify the implementation requirements for the construction of much needed facilities and the implementation of new tourism opportunities (package tours, outfitters, etc.).

The objectives of the study are as follows:

- o to develop a background of information on tourism development in the Western Arctic Region for the public and private sector;
- o to detail a specific implementation strategy for tourism development;
- o to increase the community awareness of tourism opportunities and potential developments;

- o to provide a specific marketing strategy for the region with definite action oriented goals to be implemented prior to the completion of the study;
- o to develop tourism products and prepare prefeasibility studies for a number of projects during the planning process; and
- o to encourage private sector development in the Western Arctic tourism industry.

The study then was clearly meant to encourage locals to become actively nvolved in the travel industry as well as provide operators and government with a blueprint for future tourism development.

At the onset of the study, interest in tourism development opportunities was relatively low, and the impact of the oil and gas industry was very much in evidence. Gradually, however, as the reality of the downturn in gas exploration set in, many local entrepreneurs became enthusiastic about the travel industry. The last half of the study process was marked by extraordinary involvement of the local people.

The study also had the ongoing support of the GNWT particularly the Department of Economic Development and Tourism in both Inuvik and Yellowknife.

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1. INTRODUCTION

The Region

"You mean you can really drive to the Arctic? Sounds like a winner. Whats' there to do when you get there?"[1]

Despite his basic lack of knowledge of the Western Arctic, this gentlemen succinctly summed up the region - its product (the Arctic), its potential (a winner) and yes, its problem - (what to do when you get there).

The Western Arctic has product. And while it too easily conjures up adjectives like "unique", "diverse", "world-class" and "pristine" it does offer:

- o the only public highway to the Arctic - with a short flight to the Arctic Ocean;
- o diversity of cultures, including all 3 native cultures as well;
- o diversity of scenery, including mountains, a major Canadian river and delta, barren lands and ocean coastline;
- o world-class adventure such as wildlife observation on Banks Island, canoeing the Firth River, photography on Herschel Island, contacting native culture in Fort Good Hope and Paulatuk and trophy fishing on Great Bear Lake; and
- o pristine wilderness, Richardson Mountains, Northern Banks Island and Anderson River.

It would also seem to be a winner. In recent years, and especially during the 1987 season, growth rates in most market segments achieved astonishing high levels.

Leading the increase in visitation and in revenues was the stellar performance in the recreational vehicle segment which grew by approximately 70% over 1986. Improved conditions on the Dempster Highway, the affects of the N.W.T./Yukon pavilions at Expo ’86, improved maps and promotion brought unprecedent numbers of vehicles to Inuvik. This growth also led to phenomenal increases in flightseeing, particularly to Tuktoyaktuk and Aklavik. Although the projected “tourism crisis” did not materialize in 1987, campgrounds were frequently filled to near capacity and retail outlets benefited.

More specifically tourism came into its own as an industry. Tuktoyaktuk was not exposed to the normal 100 tourists but instead 1,500 and Aklavik which knew very little of tourism saw 800 pass through the community. The growth was also part of a new and powerful trend towards adventure travel. While this rapidly emerging tourism segment has been experiencing 20% growth in the south for the past 5 years these markets are only starting to discover the north where similar growth rates are evident in the Yukon, Dawson City and Alaska. The particular element of the adventure traveller that is most appropriate to the Western Arctic is the casual category and particularly those that are recreational vehicle operators. This segment will continue to drive volume growth in the Western Arctic over the next 5 to 7 years.

Finally there is the issue of “what is there to do when you get there?"[2] At this time there are not enough activities and products to meet the demands of the markets. Consequently one of the objectives of this document is to indicate what can be done to satisfy existing markets as well as continue to attract new customers. The Master Plan has also gone beyond the simple identification of development opportunities, based on perceived market demand, and provided on site, hands-on information on how to develop product.

The tourists will continue to come in great numbers despite what happens in terms of marketing and product development over the next 5 years. What this study addresses is the long term **viability** of a healthy tourism industry for the region based on qualified and quality tourism development.
This will require extensive:

- o Private/Public capital investment;
- o realistic and targeted marketing;
- o extensive hospitality training;
- o ongoing technical assistance in terms of product development and marketing; and
- o **commitment** by the government, WAVA and the private sector.

These final five points have been described in great detail in virtually every Regional Master Plan to be produced in the Northwest Territories. There is no need to go into further detail other than to underline that where the requirements "have been met, such as in the **Baffin** and the **Keewatin** regions, real growth has been realized.

If that **commitment** is shown, the economic impacts will be many times greater than those two regions **(Baffin, Keewatin)** combined.

The Western Arctic can become the number one tourism region in the Northwest Territories. Overall investment in this area will yield a greater return than in other regions and monies, particular government expenditures to defray construction and start-up costs will be paid back many times as the industry continues to grow.

THE COMMUNITIES

The development strategy is based on a **community-based** approach which is fully consistent with GNWT tourism policies and the **community** resources of the Western Arctic. Community-based tourism focuses tourism activity on communities where most services are located. Tourism products will be developed in and around communities enabling visitors to experience both the northern environment and as well as the social fabric of the community.

With tourists using a community as a base point for tours to surrounding attractions, local tour operators can utilize existing local services, thereby enhancing the benefits of tourist expenditures for each community. Furthermore, by bringing tourists through the communities, local residents can be encouraged to participate in the planning of tourism development. The intent of a community-based approach to tourism development is to concentrate the economic and social benefits from tourism in the communities and to offer visitors the unique experience of participating in a community's culture and lifestyle.

While each community acts as a service centre, it is also part of a network of communities offering visitors different experiences. For balance in the region, communities need to establish individual themes with identifiable character and types of experience. Cooperation, not competition, is essential.

The quality of the tourist experience is closely associated with the degree of communication between the various components that make up the attractions and services. The performance of one operator affects the success of others. The quality of the tourist experience in one community affects the overall regional tourism experience. Communication between operators and communities allows for better industry understanding, cooperation and performance.

The community-based approach also recognizes that individual communities develop at different rates. The positive experience of the more aggressive communities can demonstrate to other communities the benefits from tourism development and how tourism projects can be successful implemented. If one community wishes to proceed at a faster pace than others, its travel products could be packaged with the products of communities in other regions (e.g. Arctic Coast, Dawson City of Big River).

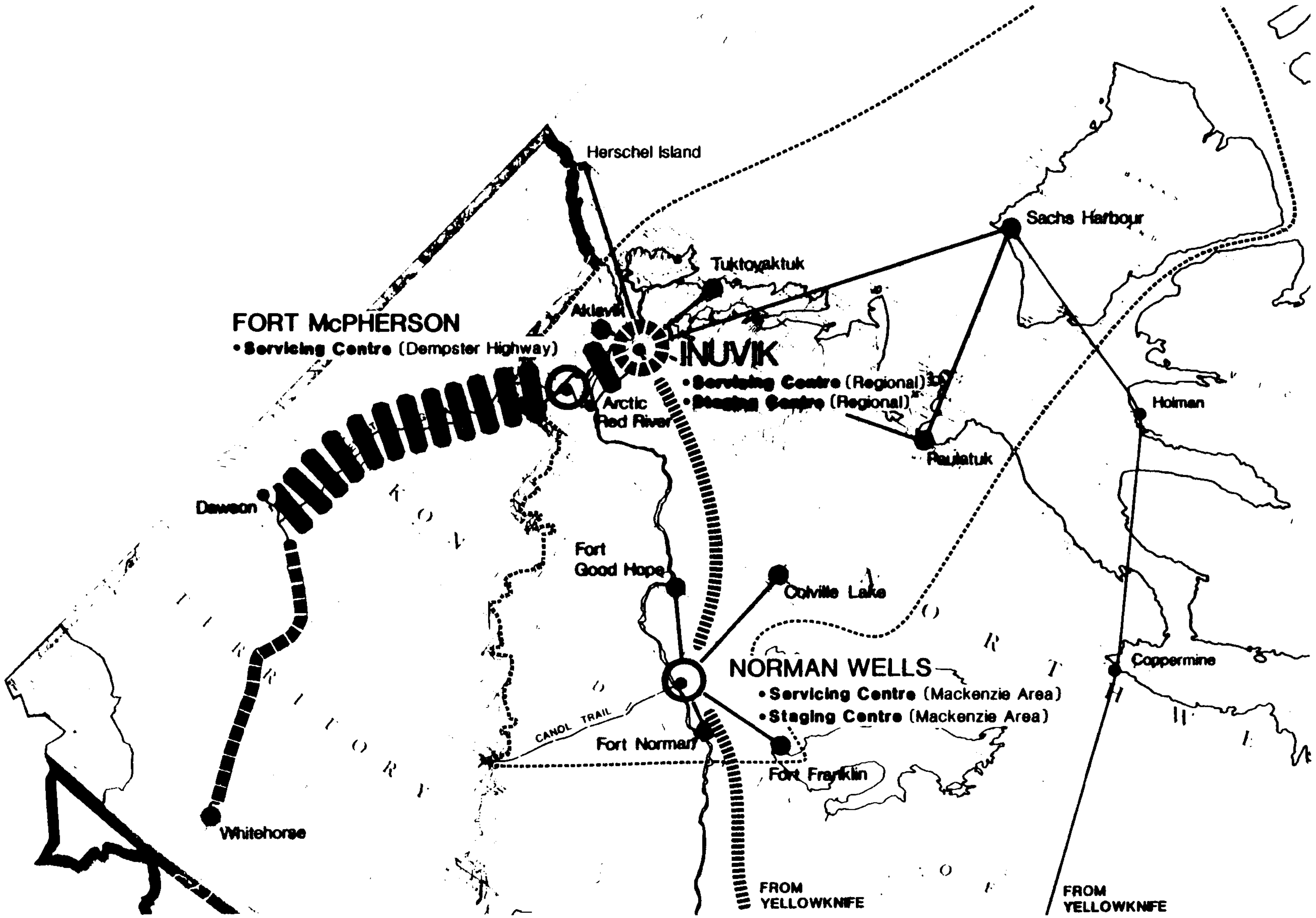
Each community will match its unique natural and cultural resources with the overall regional themes and development concept. In order to respect the integrity of each community, as well as respond to the variety of market segments, it is possible to suggest a distinct focus for each community. In some cases more than one primary tourism activity may be suggested. For instance it is not necessary to suggest that wilderness tours are more important in Sachs Harbour than sport hunting. In addition, secondary themes are sometimes appropriate for certain communities.

Designating a particular orientation for a community does not imply that it is locked into a rigid description. The purpose is however, to create an integrated and balanced development plan throughout the region, as well as promote inter-community collaboration. The latter is potentially achieved, for instance, by two adjacent communities offering complementary activities in an overall two-community package.

The themes and subthemes proposed for each community are summarized on the following table:

COMMUNITY THEMES

COMMUNITY	THEME	SUBTHEME
A. MACKENZIE RIVER AREA		
a) Norman Wells	Mackenzie River Canol Trail	Oil and Gas Industry Interpretation
b) Fort Franklin	Trophy Sportfishing	Native Lifestyle
c) Fort Norman	Sport Hunting	Wilderness Tours
d) Fort Good Hope	Mackenzie River Arctic Circle	Sport Hunting/Fishing Dene Culture
e) Colville Lake	Sportfishing	Native Lifestyle
B. MACKENZIE DELTA AREA		
a) Inuvik	Regional Staging Area Mackenzie Delta	Destination Attractions Information Services
b) Aklavik	Richardson Mountains History	Herschel Island Sport Hunting Arts and Crafts Mackenzie Delta
c) Fort McPherson	Dempster Highway Visitor Services	Loucheux Culture Sport Hunting Dempster Patrol Peel River Interpreta-tion
d) Arctic Red River	Dempster Highway Services	Native Culture Fish Camp
C. ARCTIC OCEAN AREA		
a) Paulatuk	Nature/Ocean Tours Wilderness Lodge	Sport Hunting/Fishing Inuit Culture Arts and Crafts
b) Sachs Harbour	Banks Island Nature Interpretation	Sport Hunting
c) Tuktoyaktuk	Arctic Ocean Touring Inuit Culture	Pingos Oil and Gas Sport Hunting



WESTERN ARCTIC

Tourism Strategy

Western Arctic Visitors Association
Economic Development and Tourism
Government of the Northwest Territories

LEGEND

Regional Boundary

Rubber Tire Access Route

Air Access Route

Development Concept

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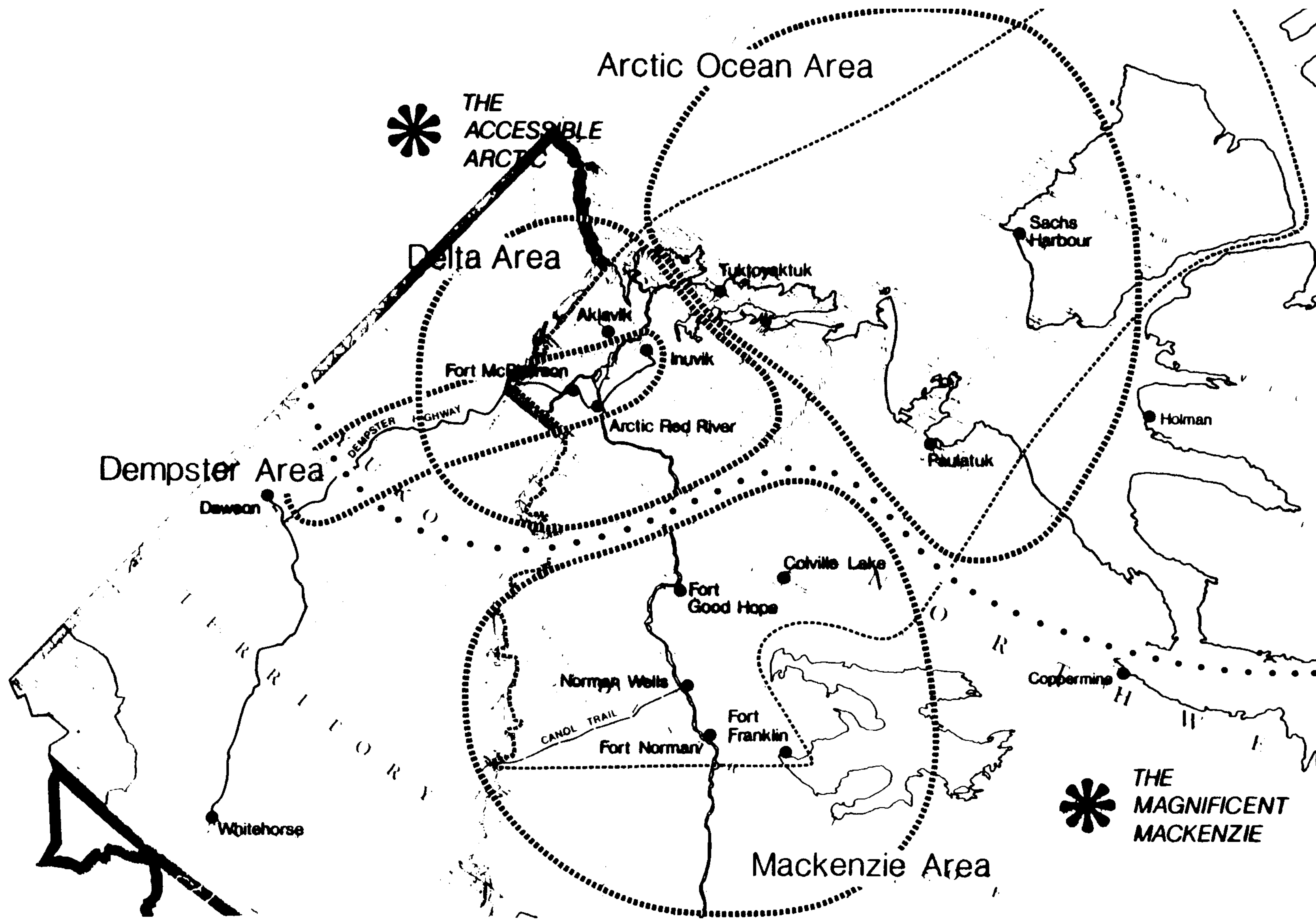

WESTERN ARCTIC

Tourism Strategy

Western Arctic Visitors Associatio
Economic Development and Tourism
Government of the Northwest Territories

LEGEND

Regional Boundary

Sub-Region

Theme

Area/Corridor Boundary

Attraction Concept

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2. EXISTING TOURISM FACILITIES/ACTIVITIES

Fort Norman

Fort Norman has one of the most picturesque locations in the Western Arctic. Its siting at the foot of Bear Mountain and the junction of the Bear and Mackenzie River make it an attractive stop over for trips on the Mackenzie or for those canoeists/ rafters interested in doing the Bear or Redstone Rivers.

While it is difficult to consider Fort Norman as a destination community in itself it does have access to resources that them- selves have an international appeal. They include;

- the E/1-6 outfitting territory
- the Redstone River.

The E/1-6 territory is presently being used by Redstone Outfitters and the owners have indicated that they are willing to sell. This would provide an excellent opportunity for Fort Norman residents to become involved in big game hunting and wilderness adventure travel, both of which are typcially very profitable operations.

The Redstone River is also one of the better wilderness canoing rivers in the Mackenzie Area and provides an opportunity for a local outfitter to provide canoe packages.

DRUM LAKE LODGE

Finally the well respected Drum Lake Lodge is operated out of Fort Norman. However its distance from Norman Wells makes packaging very difficult. Drum Lake Lodge is using Larry Wallace as an expediter. They had a slow summer with no non-resident visitors at all. Cost of transportation to the site is the biggest problem. The lodge should consider a lease arrangement for an aircraft and pilot if it expects to offer lower and stable (prices currently vary with weather conditions) transportation costs. There are at least 2 float planes in Norman Wells that are not being used. If a pilot could be found who is willing to work on an hourly basis this would prove to be more cost effective in terms of the overall package price.

Fort Norman

0 Existing Facilities

See Table located at the end of this section.

o Resources

- Mackenzie River/Bear River;
- close access to 5 outfitting areas for big game hunts;
- Redstone River canoe route; and
- several quality sport fishing lakes.

o Issues and Trends

- potential acquisition of E/1-6 outfitting area by locals.

o Development Opportunities

Short Term
- boat trips on the Great Bear and Mackenzie Rivers including overnight in outpost camps; and
- package guided canoe trips on the Redstone and Mackenzie Rivers.

Long Term
- Tate Lake Fishing Lodge; and
  acquisition of E/1-6 outfitting area.

Component	Name	Facilities
FORT NORMAN		
Accommodate on	Bear Lodge	8 rooms, 15 guests, dining area
	Drum Lake Lodge (Wrigley Lake)	35 guests, lodge, tents, airstrips
Restaurant	Metis Coffee Shop	
Attractions	Anglican Church Archaeological Artifacts Mackenzie River	
Activities	Several powerboats Arctic Red River Outfitters	hunting, hiking
Services	The Bay Sarah's Arts and Crafts	
Transportation	Ursus Aviation Nahanni Air Winter Road Access	Fort Norman based charters scheduled flights

3. DEVELOPMENT OPPORTUNITIES

PRIORIN I

BIG GAME OUTFITTER
FORT NORMAN

1. **BACKGROUND/RATIONALE**

- o the Redstone outfitters is for sale - this has typically been a very successful big game operation with high annual bookings;
- o while it is questionable that the operation is worth the requested $550,000.00 it is nonetheless an excellent opportunity to turn a quality tourism business over to local and/or native owner;
- o there are several groups that are interested in the acquisition and experience in outfitting and operation management should be considered important to funding support;
- o all existing El-1, El-6 outfitters have high bookings and are economically successful; and
- o only need 12% repeat for full occupancy.

2. DESCRIPTION

- o acquisition should be contingent on at least 3 years of management by present owner; a management fee would be part of the overall payment for the acquisition; and
- o within 4 to 5 years it will be necessary to upgrade the facility with a lodge and cabin; this would also enable the facility to attract the expanding wilderness adventure market.

3. OBJECTIVES

- o provide a successful business to a local native group, particularly in Fort Norman which has limited destination opportunities;
- o create 6 to 8 jobs for full season guiding (hunting, fishing, wilderness tours);
- o provide access to the Mackenzie Mountains; and
- o strengthen Norman Wells as a staging area.

4. MARKETING STRATEGY

- o produce a brochure;
- o announcement of change;
- o solicit hunts from mailing list;
- o attend Safari Club and FNANS trade show; and
- o advertise in Wild Sheep, Safari and Petersons.

5. RESPONSIBILITY AND IMPLEMENTATION

- private operator; and
- joint venture with private operator/" ocal development corporation.

6. PERFORMANCE INDICATORS

- provide a manager and 5-7 seasonal guiding jobs;
- act as a major economic opportunity for Fort Norman, resulting in benefits from additional revenue; and
- generate 50 hunting/fishing trips per year @ $5,000.00 = $250,000.00.

7. OPPORTUNITIES AND CONSTRAINTS

- Redstone Outfitters is for sale and can be expanded from a strictly hunting operation into a fishing/wilderness business to meet the increasing market.

8. IMPLEMENTATION STEPS

- identify a local operator;
- develop plan for purchase/take-over of Redstone Outfitters;
- apply for funding and bank financing;
- purchase with management contract by present owner included;
- PrePare business plan; and
- develop brochures and promote.

9. COSTS

Acquisition/Management: $450,000

Feasibility Study: $40,000

Start-up: $120,000

Expansion: $250,000

Total Costs: $860,000

10. REVENUE AND OPERATING COSTS

Revenue in 1992

30 hunters purchasing packages ranging from $3,400.00 - $7,900.00 ($310,000.00)

Operating Costs

Food	$ 42,000.00
Wages	51,000.00
Marketing	6,500.00
Professional Fees	3,000.00
Utilities and Insurance	13,000.00
Lease and Licence	300.00
Wintering Horses	26,000.00
Transportation	2,000.00
TOTAL:	$143,800.00

PRIORITY I

CANOE TRIP OUTFITTER
FORT NORMAN

1. BACKGROUND/RATIONALE

- with greater interest in canoeing/rafting there will be increased use of rivers such as the Bear, Redstone, etc., in order to develop and provide local guides on these tours, it will be necessary to establish an outfitter;
- joint packages could be developed with Canoe Trip Outfitters in Norman Wells and Fort Good Hope;
- rafting trips on the Bear could be organized with Fort Franklin; and
- southern wholesalers (Black Feather Great Expeditions) have indicated a desire to work with locals and expanding beyond their existing Mountain River Product.

2. DESCRIPTION

- the operation should be established in 3 to 4 years with capital used for tent frames and camping equipment.

3. OBJECTIVES

- maximize benefits to local business by offering a variety of canoe packages;
- create opportunities for local trained guides; and
- establish a component for an overall canoeing outfitting service in the Bear Area including cooperation with Norman Wells and Fort Good Hope.

4. MARKETING STRATEGY

- produce a brochure;
- contact major tour operators such as Black Feather, Ecosummer, etc.; and
- advertise in Up Here, Canoe, Che-Mun, etc.

5. RESPONSIBILITY AND IMPLEMENTATION

- private operator(s).

6. PERFORMANCE INDICATORS

- purchase of 5 day packages ($275.00/day) by 50 canoeists/rafters;
- generate 20 extra nights to Norman Wells; and
- provide 3 part time jobs.

7. OPPORTUNITIES AND CONSTRAINTS

- excellent canoe rivers in the area;
- excellent opportunity to take advantage of increasing market for canoeing/rafting of wilderness rivers;
- canoe trip outfitters could provide joint packages in Norman Wells, Fort Good Hope and Fort Norman promoting inter-community development; and
- hunting guides might also be able to supplement income.

8. IMPLEMENTATION STEPS

- identify local operators;
- develop financial arrangements;
- prepare packages and brochure; and
- wholesalers contact southern markets.

9. COSTS

Equipment: $60,000
Start-up: $50,000
Total Costs: $110,000

10. REVENUE AND OPERATING COSTS

Revenue in 1993

By 1993 there will be canoe/kayak/zodiac packages in the region. If the outfitter attracts 12%, this will provide 42 guests.

42 guests x $1,975.00/trip	$82,950.00
Pick up rafters coming down the Bear for boat trip to Norman Wells = 20 x $120	2,400.00
TOTAL:	**$85,350.00**

costs

Salaries - Head Guide/Operator (4 months)	$18,000.00
Assistant/Cook (3 months)	9,000.00
Guide (2 months)	5,000.00
Administration	2,000.00
Food/Supplies	19,000.00
Fuel/Boat	2,500.00
Maintenance	2,800.00
Promotion	4,000.00
Insurance	1,500.00
TOTAL:	**$63,800.00**

MACKENZIE RIVER AREA	1989 ('000) $	1990 ('000) $	1991 ('000) $	1992 ('000) $	1993 ('000) $	1994-1995 ('000) $
FORT NORMAN						
1. BIG GAME OUTFITTER						
Acquisition/ Management	100	150	150	50		
Feasibility/Start-up	70	40	30	20		
Expansion			50	100	100	
2. CANOE TRIP OUTFITTER						
Equipment			35	25		
Start-up			20	20	10	
TOTAL:	$ 170	$ 190	$ 285	$ 215	$ 110	$
GRAND TOTAL:	$ 970,000					

MACKENZIE RIVER AREA ($'000)	ECONOMIC DEVELOPMENT AND TOURISM	EDA	SPECIAL ARDA	NEDP	NATIVE DEVELOPMENT CORPORATION	ESKIMO LOAN FUND	HAMLET/TOWN COUNCIL	REGIONAL VELOPMENT CORPORATION	NORTHERN HERITAGE CENTRE	LENDING INSTITUTIONS SMALL BUSINESS LOAN FUND	PRIVATE OPERATOR EQUITY
FORT NORMAN											
1. BIG GAME OUTFITTER											
Acquisition/Management		100	50	200	50			50			
Feasibility/Start-up	50	50	50					10			
Expansion		100			100					25	25
2. CANOE TRIP OUTFITTER											
Equipment	20	30									10
Start-up	20	20			10						
TOTAL:	90	300	100	200	160			60		25	35

4. COMMUNITY TOURISM MARKETING STRATEGY

The regional marketing strategy outlines marketing expenditures for the Western Arctic from 1989 to 1995. Each community must also participate in the overall marketing plan through;

- expenditures by local suppliers and operators;
- expenditures by hamlets; and
- joint expenditures with WAVA.

Community based marketing will take the form of;

- consumer magazines;
- brochures and flat sheets;
- tour operator familiarization tours;
- consumer travel shows;
- travel writers;
- videos;
- inquiry fulfillment;
- mailing list development;
- WAVA special promotions/media events;
- in-house promotions/give aways;
- marketing support; and
- marketing research.

The marketing plan is tailored to reflect the general orientation of TIA an Travel Arctic, but is more target specific, focusing on identified market segments to the Western Arctic and the individual community product offerings.

OVERALL GOALS

Individual communities will participate in the regional strategy by supporting specific objectives including;

R

- Focusing on the western United States and increasing their share from 40% to 60% of the overall market. This will necessitate lowering the Canadian components from 60% to 40% and bringing the geographic breakdown more in line with the Yukon.

- Capitalizing on the Dempster Highway by increasing rubber tire volume to Inuvik by 30% per year over the first 3 years of the plan.

- Increasing the Western Arctic market share of travel industry revenue to the N.W.T. by 5% in the first three years, thus solidifying the Western Arctics' position as a major N.W.T. destination region.

- In Canada, focusing on southern Ontario especially in those populated areas that can deliver the volumes.

- Promoting in high population areas and increase Western Arctic tourism 3 fold over the next 5 to 7 years (See Market Projections).

COMMUNITY MARKETING OBJECTIVES

Each community strategy has been designed to meet the following objectives:

- focus on new adventure travel activities such as canoeing, hiking, fishing, cultural inclusion, etc.

- working closely with TIA-N.W.T. and Travel arctic by:
  - responding rapidly (fulfillment) to 1-800 number leads
  - complementing generic travel Arctic advertising with community product specific advertising
  - maintaining a 80% level of target specific promotion within the community local operator budgets

o appealing for the most part to:
- hiking, canoeing, hunting and fishing, and cultural/nature interpretation tour wholesalers and consumers.

o placing a major emphasis on print material which reaches high numbers and supports inquiry fulfillment 1-800 requests, travel magazines, etc.

o advertising in specifically high end magazines that appeal to consumers that are:
- activity oriented
- interested in specific products and prices
- oriented toward culture and nature interpretation
- potentially interested in package tours

COMMUNITY MARKETING EXPENDITURES (1989 Dollars)

The following tables outline, on a year by year basis the marketing activities for your community. Responsibility for many of these expenditures are to be cost shared with WAVA as well as other funding sources. As well all displayed cost do not necessarily suggest that your community need participate. However the opportunity is there to be involved in such activities as trade shows, the regional directory, regional videos, etc.

MARKET PROJECTIONS FOR THE WESTERN ARCTIC

MARKETS	ACTUAL 1987	1988	1989	1990	1991	1992	1993
Rubber Tire							
R.V.	4,815	5,906	7,677	9,980	2,475	15,594	17,933
Auto	850	1,027	1,334	1,735	2,168	2,710	3,116
Coach	649	690	750	810	870	930	990
Small Vans	47	83	113	143	173	193	230
Hunting							
Beaufort Area	86	95	-	104	112	120	125
Bear Area	180	204	228	252	276	300	320
Aklavik/McPherson	-	5	10	20	30	40	45
Fishing							
Trophy	260	300	360	440	520	560	600
Wilderness	92	100	120	200	260	300	320
Adventure Travel							
Hiking	-	30	60	120	240	360	420
Canoe/Kayak/Zodiac	57	100	130	170	220	286	352
Boat Cruise (Package Only)	-	20	72	88	106	140	160
Wildlife/Photo/Herschel	18	60	120	180	270	351	456
Culture/Arts and Crafts Workshops	-	20	40	60	80	120	140
Air	750	790	830	870	915	960	1,056
TOTAL:	**7,804**	**9,430**	**11,845**	**15,172**	**18,715**	**22,964**	**26,263**

MARKETING STRATEGY SUMMARY

	1989	1990	1991	1992	1993	1994/95
CONSUMER MAGAZINES	40,670	42,330	41,170	36,220	37,110	66,140
BROCHURES, OPERATOR AND GENERAL WAVA	65,500	30,000	30,500	38,500	143,800	146,000
COMMUNITY FLAT SHEETS	22,000	18,700	23,500	22,400	27,500	58,800
TOUR OPERATOR, FAMILIARIZATION TOURS	12,800	8,150	8,100	2,900	5,050	-
CONSUMER TRAVEL SHOWS	33,900	37,000	40,220	31,950	27,550	40,900
TRAVEL WRITERS	8,500	11,900	10,200	10,400	3,500	8,800
YUKON CO-OP WITH WRITERS	9,000	9,900	10,900	7,100	7,800	18,200
VIDEOS	50,000	77,000	64,000	75,000	77,000	100,000
INQUIRY FULFILLMENT	12,500	16,100	23,100	30,300	36,300	85,000
MAILING LISTS	35,250	42,500	51,500	62,000	76,000	173,000
WAVA SPECIAL PROMOTIONS (MEDIA) EVEN S	20,000	8,000	8,000	10,000	15,000	30,000
IN-HOUSE PROMO/GIVE AWAYS	9,700	1,200	4,200	18,500	23,000	22,000
MARKETING SUPPORT	7,000	1,500	2,500	12,500	12,000	19,000
MARKETING RESEARCH	91,500	5,000	78,000	58,500	37,000	18,000
GRAND TOTAL:	**528,320**	**339 80**	**515,890**	**4 6,270**	**528,610**	**785,840**

CONSUMER MAGAZINES

FORT NORMAN

YEAR / ACTIVITY	1989	1990	991	1992	993	1994/95
HUNTING						
E-1-1, E-1-6 OPERATORS						
o Safari Club	720	800	860	-	910	-
o FNAWS	430	470	510	-	550	-
o Bow Hunter	430	470	510	550	-	-
DRUM LAKE L						
o Equinox	580	630	-	720	-	1, 00
o Sierra	540	580	640	-	720	-
CANOEING						
o Explore	600	660	-	800	-	2,000
o Canoe	520	570	-	650	700	-
o Outside	450	500	550	-	660	1,600
o Che-Mun	300	330	360	400	440	1,100

BROCHURES

	1989	1990	991	1992	993	1994/95
o Fort Norman River Outfitter Design	-	1,000	-	1	-	-
Printing	-	2,000	-	2.500	-	6,300

COMMUNITY HAND OUTS/FLAT SHEETS

	1989	1990	991	1992	993	1994/95
o Fort Norman	1.000	1, 00	1,200	1.300	1,400	3,400

CONSUMER TRAVEL SHOWS

FORT NORMAN

YEAR ACTIVITY	1989	1990	1991	1992	1993	1994/95
WESTERN ARCT C GENERAL)						
. DALLAS SPORTSMAN SHOW (2 Persons)						
o Booth	1,000	1,[illegible]00	1.200	-	-	-
o Travel	2,000	2,200	2.400	-	-	-
o Accommodation	1,700	2,000	2,200	-	-	-
2. ANAHEIM SPORTSMAN SHOW 2 Persons						
o Booth	1,000	1,100	1,200	1,300	-	-
o Travel	2,200	2,400	2.600	2,800	-	-
o Accommodation	2,000	2,200	2,400	2,600	-	-
3. LONDON FREE PRESS SPRING SHOW (2 Persons)						
o Booth	700	750	800	850	[illegible]00	2,100
o Travel	800	850	920	1,000	1,[illegible]00	2,700
o Accommodation	.000	1,100	1,200	1,300	1.[illegible]50	3,600

TRAVEL WRITERS

FORT NORMAN

YEAR / ACTIVITY	1989	1990	1991	1992	1993	1994/95
1. CANOE/RAFTING						
○ Transportation	800	900	–	1,100	–	2,800
○ Accommodation	600	700	–	900	–	2,200
○ Land Costs	1,200	1,300	–	1,600	–	3,800
2. FISHING						
○ Transportation	–	900	1,000	1,100	1,200	–
○ Accommodation	-	500	600	700	800	–
○ Land Costs	-	1,000	1,200	1,300	1,500	–

INQUIRY FULFILLMENT

1. WESTERN ARCTIC VISITORS ASSOCIATION						
○ Response and Follow-up	2,500	4,000	6,000	8,500	10,000	23,000
2. TOUR OPERATORS	2,500	3,000	5,000	6,000	[illegible],000	20,000
3. HUNTING OPERATORS	1,500	1,800	2,000	2,300	[illegible],600	6,000

MAILING LISTS

FORT NORMAN

YEAR / ACTIVITY	1989	1990	1991	1992	1993	1994/95
1. TOUR OPERATORS 5)	3,000	5,000	8,000	11,000	[illegible] 000	40,000
2. HUNTING OPERATORS 9)						
o HTA (2) o Guided Arctic (1 o E-1, E-6 (6)	2,500	14,000	16,000	9,000	23,000	52,000
3. FISHING OPERATORS (8)	8,000	9,000	10,000	11,000	2,000	25,000

SPECIAL PROMOTIONS (MEDIA) EVENTS

	1989	1990	1991	1992	1993	1994/95
1. MACKENZIE IVER DISCOVERY EVENTS						
o Re-enactment of Mackenzie Voyage	20,000	-	-	-	-	-

IN-HOUSE PROMO/GIVE AWAYS

	1989	1990	1991	1992	1993	1994/95
1. FISHING OPERATORS						
o Drum Lake	-	1,000	-	1,000		1,000

MARKETING SUPPORT

FORT NORMAN

YEAR / ACTIVITY	1989	1990	1991	1992	1993	1994/95
1. DISPLAY MATERIAL FOR SHOWS AND FUNCTIONS						
o Hunting Outf tters	-	1,000	1,000	2,000	2,000	2,000

MARKETING RESEARCH

YEAR / ACTIVITY	1989	1990	1991	1992	1993	1994/95
1. TOUR OPERATOR SURVEYS	1,000	1,000	2,000	2,500	2,500	5,000
2. FISHING AND HUN ING SURVEYS	-	8,000	-	-	8,000	-

5. TRAINING PROGRAMS

Each community project will reuqire some level of training. It will generally be the responsibility of Arctic College, Continuing Education and Renewable Resources to deliver these programs. Where possible, courses will be given in the various communities; however, it will frequently be necessary to conduct training in Inuvik or Norman Wells because of the availability of certain training services.

Courses will generally be 1 to 4 weeks long. The following number of training weeks are proposed for your community.

MACKENZIE RIVER AREA
Training **(Weeks)**

	MANAGEMENT	MAINTENANCE	GUIDES	COOK	MAIDS	MARKETING	BOOKKEEPING/ACCOUNTING	CRAFTS INSTRUCTOR	COMPUTER SKILLS	WAITER/WAITRESS	HOST/HOSTESS
FORT NORMAN											
1. BIG GAME OUTFITTER	8	2	4x4	2		2		2	2		
2. CANOE TRIP OUTFITTER	4		2	2		1					
TOTAL:	12	2	18	4		3	2		2		

APPENDIX

REDSTONE MOUNTAIN OUTFITTERS PREFEASIBILITY STUDY

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References

1. INTRODUCTION

The Mackenzie Mountain Region in the Northwest Territories is world famous for trophy hunting of several big game species including dall sheep, grizzly bear, caribou and moose. In order to hunt big game in the Northwest Territories, non-residents are required to be accompanied by a licenced outfitter. There are eight "Class A" outfitters licenced to hunt a specific area in Mackenzie Mountain Region, Wildlife Management Zone E/l(1). Redstone Mountain Trophy Hunts, located within Zone E/l, is currently owned and operated by Hugh and Tim MacAulay. Redstone Mountain Trophy Hunts has a reputation for quality hunting as well as for varied topography and spectacular scenery. The MacAulays have offered to sell Redstone Mountain Trophy Hunts for $550,000.

The purpose of this report is to preliminarily review (prefeasibility study) the components of the Redstone Mountain Trophy Hunts outfitter operation and consider the viability of the suggested purchase price. The key aspects of the Redstone operation that are reviewed include:

- resources and assets;
- market potential;
- management issues; and
- estimated and projected costs and revenues.

As MacLaren Plansearch does not have access to Redstone Mountain Trophy Hunts' financial statements, the results of this report should be considered introductory and used only to identify issues and further research requirements.

(1) see Map 1-1

2. DESCRIPTION OF REDSTONE MOUNTAIN TROPHY HUNTS

Redstone Mountain Trophy Hunts is situated in the Redstone Mountains in Zone E/1-6(2,. Guests are flown in by charter plane from Norman Wells to the two base camps on Hook and Dan Lake. From the base camps, guests travel with their guides by pack horse to various hunting areas within Zone E/1-6.

2.1 NATURAL RESOURCES

Redstone, or Zone E/1-6 is approximately 100 miles by 60 miles, conservatively 6,000 square miles. The Redstone area has been lightly hunted over the last eleven years, conserving the quality of trophy species and in particular the quality of the Dan ram. Success rate of tagging either a Dan ram with 36" horn or a comparable trophy bull caribou is 98%.

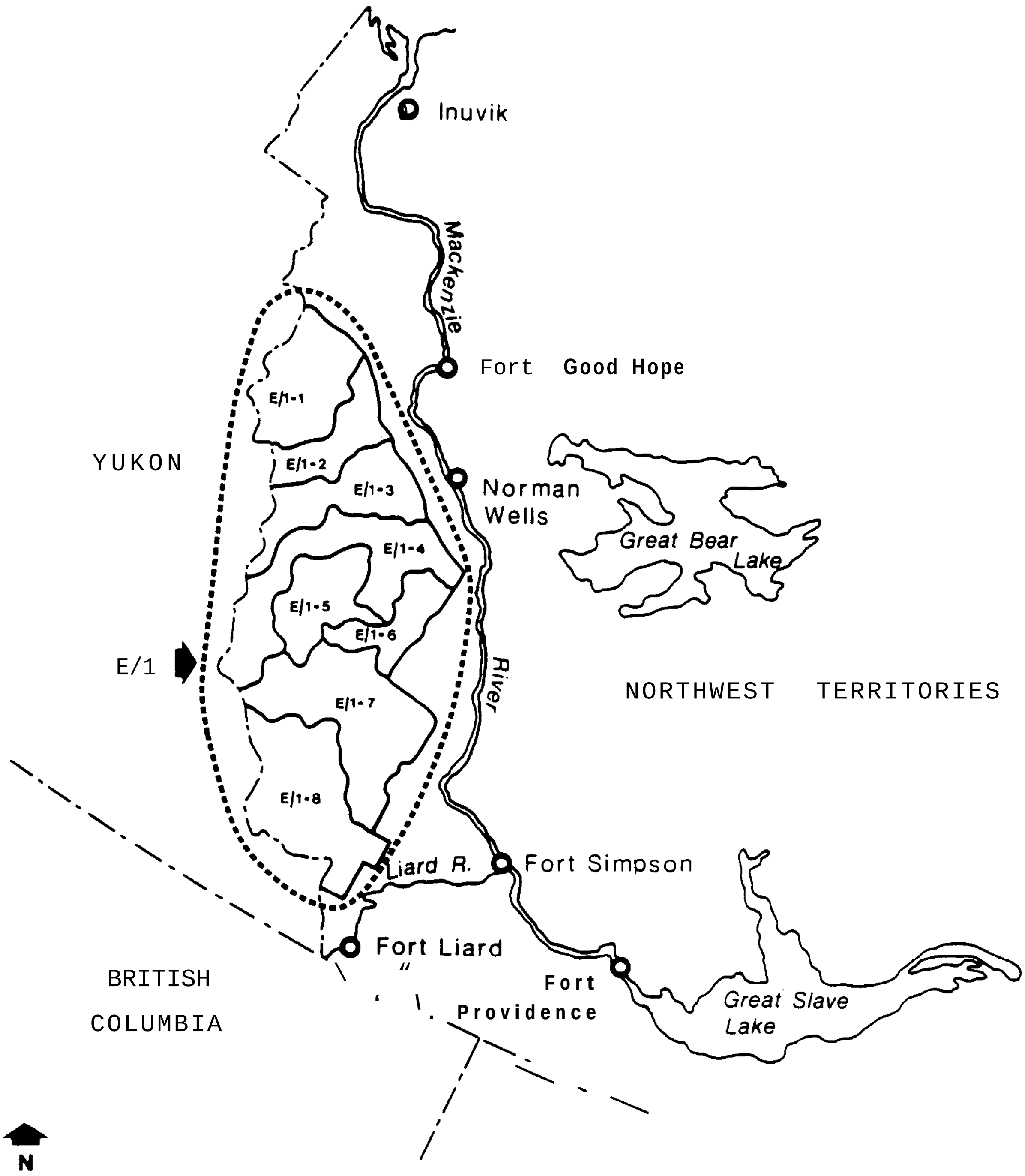
Based on the MacAulays' observations over the last eleven years, a conservative estimate of species in Zone E/1-6 is as follows.

- 600-700 Dan sheep rams 3 years or older;
- 1,200-1,500 ewes w th lambs up to 2 years;
- 3,000-5,000 caribou bulls, cows and calves;
- 250-300 moose bulls, cows and calves; and
- 60-80 grizzly bears.

There are also high populations of wolf and wolverine in portions of the Redstone with heavy concentrations of caribou, ewe and lamb.

In addition to hunting trophy species, guests also have the opportunity to fish for Arctic Grayling and Lake Trout in Hook and Dan Lakes.

(2) see Map 1-1



Map I-1

Wildlife Management Zone E/1

MACKENZIE MOUNTAIN REGION, NORTHWEST TERRITORIES

2.2 OUTFITTER ASSETS

The owners of Redstone Mountain Trophy Hunts have exclusive rights to contract hunting services in area E/1-6. This area is secured with a resident "Class A" outfitter licence giving the owners a 10-year renewable licence with an evergreen clause of never less than 10 years(3). The two base camps have 10-year renewable leases with Indian and Northern Affairs Canada.

The capital assets of Redstone Mountain Trophy Hunts are valued at approximately $312,000 and include facilities at two base camps, equipment for at least two tent camps, 20 horses and additional miscellaneous equipment. The capital assets are outlined in Table 2-1.

2.3 DESCRIPTION OF HUNTING PRODUCT

Every year Redstone Mountain Trophy Hunts offers clients a choice of six hunts. Redstone operators have limited the size of each hunt to four or five guests, and the total guests each season to twenty-five. The operators of Redstone have emphasized a quality hunting experience and highly personalized service. As a result of this emphasis, both the percentage of repeat clientele and occupancy rates are high.

The price of the Redstone Hunting package varies according to species hunted and length of the hunt. The 1988 hunting schedule is outlined in Table 2-2.

---

(3) Hugh MacAulay (November, 1987) Redstone Mountain Trophy Hunts

TABLE 2-1

REDSTONE TROPHY HUNTS CAPITAL ASSETS (1988)

FIXED BUILDINGS

Lake Hook

	Estimated $ Value
1, 14′ diameter metal storage house	$ 3,000
1, 10′ x 24′ metal, insulated, two-room bunkhouse	22,000
1, 16′ x 24′ metal, insulated, kitchen/dining room, storeroom (completion July, 1988)	60,000
1, 10′ x 12′ metal, insulated two-room wash house (completion July, 1988)	32,000
1, 12′ x 14′ wood and canvas tent frame, storehouse (heated)	3,000
3, 10′ x 12′ wood and canvas tent frame, bunkhouses (heated)	9,000
Subtotal	$129,000

Dal Lake

1, 14′ diameter metal storage house	$ 3,000
1, 10′ x 30′ metal, insulated, 3-room, wash and bunkhouse	30,000
1, 16′ x 24′ metal and frame, kitchen/dining room storeroom	60,000
1, 14′ x 16′ wood and canvas tent frame storehouse	3,000
1, 12′ x 14′ wood and canvas tent frame bunkhouses (heated)	3,000
1. 10′ x 12′ wood and canvas tent frame bunkhouse (heated)	3,000
Subtotal	$102,000

Ross River. Y.T.

1, 16′ x 24′ plywood frame storehouse	$ 6,000
Subtotal	$ 6,000

FIXED EQUIPMENT

2, Honda generators	$ 10,000
2, 5Bx-11A single sideband radios c/w antennas	7,000
2, 14′ Lund aluminum boats c/w oars, lifejackets	13,000
2, Mercury outboards, 9.8 hp., 20 hp.	5,000
Kitchen equipment and utensils for 12 people each camp	1,000
Subtotal	$ 36,000

		Estimated $ Value
HORSES AND EQUIPMENT		
20 pack and saddle horses		$ 23,300
10, riding saddles, bridles, blankets		
15, pack saddles, blankets, tarps, lash ropes, pack boxes		
20, halters, hobbles, bells		
400 lbs. assorted horse shoes, new and used		
	Subtotal	$ 23,300
CAMP EQUIPMENT		
3, 12'x12'x5' pyramid, canvas tents		$ 1,500
1, 12'x12'x5' wall style, canvas tent		500
5, 10'x12'x4' wall style, canvas tents		500
3, 4-man mountain tents, nylon		1,500
2, 3-man mountain tents, nylon		1,500
3, Homelite chainsaws		1,200
6 Coleman lamps		150
3, Coleman propane camp stoves		150
15, 4 hold cookstoves, wood burning		1,125
15, 2 hole heater stoves, wood burning		750
kitchen equipment for 24 people		1,000
	Subtotal	$ 9,875
MISCELLANEOUS		
axes		
shovels		
Sweda saws		
hand tools		
shoeing tools		
pack and saddle horse equipment		
grills		
assorted spikes and nails		
rope		
used tents, tarps		
propane bottles		
propane heaters		
fuel		
horse food		
salt		
groceries		$ 6,000
	Subtotal	$ 6,000
	TOTAL ESTIMATE OF CAPITAL ASSETS	$312,175

TABLE 2-2

HUNTING PRICE AND SCHEDULE (1988)

HUNT	DATES	SPECIES	PACKAGE PRICE (U.S.$)
1	July 20-30 (10 days)	Sheep, Wolf	$4,900.00
2	July 30 - August 9th (10 days)	Sheep, Wolf	$4,900.00
3	August 9 - 23 (12 days)	Sheep, Caribou, Moose, Wolf, Wolverine	$6,300.00
4	August 23 - Sept 6 (12 days)	Sheep, Caribou, Moose, Wolf, Wolverine	$6,300.00
5	September 6 - 20 (12 days)	Sheep, Caribou, Moose, Wolf, Wolverine	$6,300.00
6	September 20 - 25 (5 days)	Caribou, Wolf	$2,700.00

In addition, clients are charged $400.00 (Canadian) for return charter flight from Norman Wells to the base camps. Clients are also responsible for licence and trophy tag fees.

TARGET MARKET

The majority of guests at Redstone Mountain Trophy Hunts are from the United States. However, MacAulay's have had enquiries each year from hunters in Europe, indicating a potential market outside of North America. The following table presents general information on Redstone target market.

TABLE 2-3

DESCRIPTION OF TARGET MARKET

Number of Guests Operation Accommodates	o Operators have limited number of guests each year to 25, four and sometimes 5 guests per hunt. ● Facilities could accommodate twice as many guests but there are only enough guides to handle 5 guests (unless husband/wife or father/son share a guide).
Length of Season	● 9 weeks
Occupancy Rate	● 25 guests per season - 100%
Repeat Clientele	● 80% of guests hunt more than once at Redstone. 30% of guests hunt more than twice at Redstone. (Each year 75 to 85% of guests are repeat.)

The purchaser of Redstone will receive a proven client list of 250 guests. Given the high percentage of repeat clientele, this list will be a key marketing tool. In any one year, only 12% of the client list needs to return to Redstone to ensure 100% occupancy.

DESCRIPTION OF STAFF AND ACCOMMODATION

Hugh and Tim MacAulay own and operate Redstone Mountain Trophy Hunts. The brothers also work as guides during the hunting season. In addition to the brothers, there are four other staff members. Table 2-4 describes the staff required to operate Redstone.

TABLE 2-4

DESCRIPTION OF STAFF AND ACCOMMODATION

Accommodation Type	• Base Camp with Bunk Facilities o Additional Camps with Tenting Facilities
Number of Staff	o 6 (including the two operators)
Description of Staff	• 5 guides (also act as horse wranglers and cooks outside of base camps) • 1 cook

3. PRELIMINARY MARKET ANALYSIS

The following information on sportshunting market is based on a review of relevant reports and on interviews with the "Class A" outfitters(4) operating in Zone E/l.

3.1 SPORTSHUNTING TRENDS IN NORTHWEST TERRITORIES

Trophy sportshunting is a specialized tourism market segment in the Northwest Territories. However, sportshunting is a recognized and growing component of the tourism industry. In the last two years, the number of hunters in Beaufort and Bear areas of the Northwest Territories increased 76%(5).

The market for sportshunting is over 70% non-Canadian, with the majority of hunters coming from the United States. Using 1983/1984 licencing data from Inuvik Region(6), Table 3-1 illustrates the number and percentage of hunters by geographic region.

Information regarding income and age of hunters traveling to Northwest Territories is not available. However, in the Yukon where a comparable hunting product is marketed, data is available. The typical sportshunter traveling to the Yukon is:

- male;
- aged 35 - 60 years;
- a senior business executive or professional; and
- makes at least $40,000 per year(7).

(4) Paul Rivard (1988) Department of Renewable Resources, Inuvik Region, N.W.T.
(5) MacLaren Plansearch (1987), Vancouver, British Columbia
(6) Zone E/1 is in the Inuvik licencing region
(7) MacLaren Plansearch (1987), Vancouver, British Columbia

TABLE 3-1

NON-RESIDENT HUNTERS - INUVIK REGION

1983/84

GEOGRAPHIC REGION	NUMBER OF HUNTERS	% OF TOTAL NON-RESIDENT HUNTERS
Alberta	45	
British Columbia	7	
Rest of Canada	4	
Sub-total Canada*	56	28%
California	22	
Colorado	9	
Florida	11	
Louisiana	9	
Texas	12	
Wisconsin	6	
Wyoming	9	
Rest of United States	56	
Sub-total United States	134	68%
Overseas and Mexico	7	4%
Sub-total Non-Canadian	141	72
TOTAL HUNTERS	197	100%

Source: Renewable Resources, Inuvik Region (1987).

* Excludes N.W.T. residents and persons living in N.W.T. less than 6 months.

Opportunities to expand the sportshunting industry from a domestic to an international perspective involve stronger promotional efforts in the sportshunting markets of Alberta, Germany, Japan, France and Belgium. The Northwest Territories will continue to capture its share of growing specialized sportshunting market if outfitters continue to offer competitive packages and quality hunting experiences.

3.2 MARKET COMPETITION

Redstone Mountain Trophy Hunts' key competitors in the Northwest Territories are the seven other "Class A" outfitters in Zone E/l. However, there is also competition from 8 or 9 members of the Yukon Outfitters Association who operate big game hunts on the western side of the Mackenzie Mountains. Similar species are hunted and they has been averaging 10-11% annual growth over the last 3 years. The majority of these outfitters are operating slightly under capacity at approximately 80-85%. A description of packages, target market and staffing of the key comparable operations follows.

3.2.1 Description of Packages

Seven "Class A" outfitters offer a hunting product that is very comparable to Redstone Mountain Trophy Hunts. As with Redstone, the majority of outfitters fly guests into base camps from Norman Wells or Watson Lake and use pack horses to transport guests to hunting areas. Table 3-2 outlines length of hunt, species and price of package by outfitter.

The hunting season for each outfitter begins in the middle of July and ends late September or early October. The average length of each hunt is 12 to 15 days, including two days' traveling time. The most popular trophy hunts are the Dan Sheep hunt and "mixed bag" or several species hunt. The major gateways into the hunting area are Watson Lake and Norman Wells. If transportation is not included in the hunting package, the cost is usually an additional $300.00 - $500.00 (Canadian).

TABLE 3-2

DESCRIPTION OF COMPETITIVE PACKAGES

1988

NAME OF OUTFITTER	LENGTH OF HUNT	SPECIES**	PRICE (U.S.$)
E/1-1	12 days	Dan sheep	$5,900
Arctic Red River Outfitters	14 days	Dan Sheep and Caribou	7,400
E/1-2	14 days	Dan Sheep	$5,700
		Sheep and Caribou	6,700
Gana River Outfitters		Sheep and Moose	6,700
		All species	7,700
		Moose and Caribou	5,700
E/1-3	7 days	Caribou	$2,500
Mackenzie Mountain Outfitters	14 days	Sheep and Caribou	5,500
E/1-4	12 days	Dan Sheep	6,500
		Caribou	3,300
Ram Head Outfitters*		Moose	4,000
		Mountain goat	3,800
		Sheep and Caribou	7,800
		Sheep and Moose	7,800
E/1-5 Northwest Territories* Outfitters	14 days	Dan Sheep	$6,950
	7 days	Caribou	1,900
	12 days	Moose and Caribou	4,500
E/1-6 Redstone Trophy Hunts Outfitters	10 days	Sheep	$4,900
	5 days	Caribou	2,700
	12 days	Sheep and Caribou	6,300
E/1-7 South Nahanni Outfitters	12 days	Mixed bag	$5,800
E/1-8 Nahanni Butte Outfitters	14 days	Dan Sheep	$7,000
	10 days	Caribou	2,500

Source: MacLaren Plansearch (1988) Vancouver, British Columbia

* Transportation cost from Norman Wells or Watson Lake included in package price.

** Wolves and wolverine can be hunted in conjunction with other species.

3.2.2 Description of Target Market

Table 3-3 briefly describes the target market for each competitive outfitter. Both the geographic origin and number of guests taken on each hunt is comparable to Redstone Mountain Trophy Hunts' operation.

3.2.3 Description of Staffing

In Table 3-4 a description of staff each outfitter requires to operate is outlined. The staffing of Redstone is comparable to that of the other outfitters.

3.3 REDSTONE MOUNTAIN TROPHY HUNTS' PLACE IN THE MARKET

A review of market competition for Redstone Mountain Trophy Hunts demonstrates that Redstone offers a comparable and competitive hunting product. With respect to pricing, the Redstone Dall Sheep hunt is approximately 14% less expensive per day than the average price of the competition's Dall sheep hunts. The prices of the Redstone Caribou and Dan Sheep hunt, Caribou, Dan Sheep and Moose (mixed bag) hunt are approximately 8-10% lower than the average prices of similar hunts offered by the other outfitters.

The staffing, target market and occupancy rates of Redstone parallel the other outfitters' operations. In addition, the number of hunts offered per season and number of guests per hunt are also comparable, with the exceptions of Ram Head and Northwest Territories outfitters, who have more guests per season than Redstone or than any of the other outfitters. The higher number of guests for Ram Head and Northwest Territories Outfitters can be partially explained by the shorter length (7 days) of Northwest Territories' outfitters and by Ram Head Outfitters' larger territory.

TABLE 3-3

DESCRIPTION OF COMPETITION TARGET MARKET

1987-88

NAME OF OUTFITTER	# OF GUESTS PER HUNT	# OF HUNTS PER SEASON	OCCUPANCY RATE	DESCRIPTION OF TARGET MARKET
Arctic Red River	5 (25 hunters per season)	5	100% booked 1 yr. in advance	99% U.S.
Gana River	4-5 (20 - 25 hunters per season)	5	80 - 100% Almost Booked 1988	Majority U.S., few Europeans & Canadians
MacKenzie Mountain	(20-244 hunters per season)	5-6	100% 1988 booked	Majority U.S. few Europeans & Canadians
Ram Head	8-12 (2 hunts run simultaneously)	7 (56-84 hunters per season)	100% 1988 booked	25% Cdn. 75% U.S.A. few Europeans
Northwest Territories	4 - -8 (46-~ 6 hunters per season)	4 5	100% Almost Booked 1988	Majority U.S. 30% Repeat
Redstone Trophy	4-5 (25 hunters/season)	6	100%	Majority U.S. High Repeat 75-80%
*South Nahanni	4-5 (20-25 hunters per season)	5	80-100% 1988 booked Almost booked 1989	Majority U.S. 20% Cdn.** 40% repeat
*Nahanni Butte	5 4 (24 hunters per season)	4 1	90 - 100% 1988 booked 1989 Almost booked	Majority U.S.
TOTAL HUNTERS	Approximately 264 Hunters per Season			

Source: MacLaren Plansearch (1988) Vancouver, British Columbia
* South Nahanni and Nahanni Butte are not in the Western Arctic Tourism Region
** Canadians pay U.S. price, but in Canadian dollars.

TABLE 3-4

DESCRIPTION OF COMPETITION STAFFING

1988

NAME OF OUTFITTER	DESCRIPTION OF STAFF*
Arctic Red River	1 Cook 5 Guides Family owned & operated (horses are not used)
Gana River	1 or 2 Cooks 2 Horse Wranglers 5 or 6 Guides
MacKenzie Mountain	2 Cooks 4 Guides
Ram Head	4 Cooks 2 Horse Wranglers 12 Guides 1 Babysitter
Northwest Territories	2 Cooks 6-8 Guides
Redstone Trophy	1 Cook 5 Guides
South Nahanni	1 Cook 4-5 Guides
Nahanni Butte	1 Cook 5 Guides (horses are not used)

Source: MacLaren Plansearch (1988) Vancouver, British Columbia

* The majority of outfitters are owned, operated and managed by the same person(s). The owner(s) also work as guide(s) during hunting season.

4. KEY MANAGEMENT ISSUES

There are three key management issues that should be considered prior to purchasing Redstone Mountain Trophy Hunts Outfitters Ltd.:

- Resource Management;
- Opportunities to Increase Revenue; and
- Operational Issues.

4.1 RESOURCE MANAGEMENT

During the 1983/84 hunting season in the Inuvik region, approximately 197 non-resident hunters tagged 661 animals, 3.4 animals per hunter(9). The most popular species to be tagged included the wolf, caribou, dall sheep and moose. There are currently no limits on the number of non-resident hunters that can tag large game in zone E/1. However, each hunter is only allowed to take one of each species of large game(10). For example, non-resident hunters may only take one adult male Dan sheep. They may also take only one moose, but the moose can be any age, male or female.

However, this policy may soon change. The Department of Renewable Resources is currently studying animal populations in Zone E/l, Mackenzie Mountain Region. Depending on the results of the research, outfitters may be only given a limited amount of non-resident tags for certain species each season(n). For example, in 1988 outfitters may only be given two non-resident grizzly bear tags each.

(') see Table 4-1
(10) Gerry Hordal e (1988) Renewable Resources, Inuvi k, N.W. T.
(11) Grizzly Bear season has been closed to non-residents since 1981
(12) Gerry Hordal e (1988) Renewable Resources, Inuvi k, N.W.T.

currently, the Dan Sheep and Caribou are the "bread and butter" of outfitter operations in Mackenzie Mountain region. In the 1970's the average horn length of the Dan Sheep in the Mackenzie Mountain area was 36 - 37 inches. Currently, the average length of the horn in the Mackenzie Mountain area is 33 - 34 inches although the average length of the horn is 36 inches at Redstone(13). In order to preserve the trophy quality of the species tagged, operators have to carefully manage their game reserves.

TABLE 4-1
NON-RESIDENT* HUNTERS SPECIES TAGGED
INUVIK REGION (1983/84)

SPECIES	NUMBER TAGGED	PERCENTAGE OF HUNTERS THAT TAGGED**
Black Bear	6	3%
Caribou	139	71%
Dan Sheep	128	65%
Goat	9	5%
Moose	120	61%
Musk Ox	9	5%
Polar Bear	3	2%
wolf	140	71%
Wolverine	106	54%
TOTAL SPECIES	661	

Source. Renewable Resources, Inuvik Region

* N.W.T. residents and persons living in N.W.T. less than six months are excluded.

** Total number of hunters is 197.

Outfitter operators in Zone E/l are aware of this situation and are not planning to increase the number of hunters they take on each hunt by any more than one or two. The majority of the outfitters plan to maintain current size of their operations and one outfitter plans to reduce the number of hunters tagging Dan Sheep. However, operators will increase prices of hunting packages to compensate for this lack of expansion.

In the next few years there are no plans to open new hunting territories(13). Therefore, if the supply of hunting trips in Mackenzie Mountain region remains stable and the demand for hunting continues to increase, operators will be able to successfully increase package prices.

4.2 OPPORTUNITIES TO INCREASE REVENUES

Purchasers of Redstone Mountain Trophy Hunts could potentially increase revenues by:

- increasing the number of hunters each season;
- and/or raising the price of the hunting package.

Redstone Mountain Trophy Hunts could easily accommodate twice as many hunters as it presently does. However, Hugh MacAulay does not recommend that this be done for more than a few seasons because of the negative impact on the game resources. In addition, it is his opinion that in the first years of operation, the new operators would have difficulty in finding enough qualified guides and in trailing the extra horses required into the base camps from Ross River(14).

Hugh MacAulay does recommend increasing the number of hunters slightly each season and suggests there may be a market for one or two resident hunts each season.

(13) Ross Hagen (1988) Renewable Resources, Norman Wells, N.W.T.
(14) Already each season 20 horses are trailed into the base camp from Ross River.

Resident hunters would have to be charged a reduced rate. Gerry Hordale at Renewable Resources agrees that resident hunters, in particular hunters from Yellowknife, are a potential market if hunting packages are sold at half the price. More research is required into the resident market potential.

Another potential market is the non-consumptive adventure travel market. In early July or early October, the purchasers of Redstone could potentially increase revenues by offering wildlife safaris, photography and sportsfishing packages. Nahanni Butte is currently expanding their operations by offering photography trips, river rafting and trail riding. More research is required into the non-consumptive adventure market.

If the purchaser considers management of game and current practices of the other outfitters in Mackenzie Mountain Region, raising the price of hunting packages is the most immediate and viable option for increasing revenues. As discussed earlier in this report, the prices of Redstone packages are at least 8-10% lower than the average prices of the other outfitters' prices. The majority of the outfitters, like Redstone, raise their prices 8-10% per year. Purchasers of Redstone could preserve the quality of their hunts and raise revenues most successfully <u>by increasing the number of hunters each season from 25 to 30 and raising prices by 12% each year, over the next five years</u>.

4.3 MANAGEMENT OF OPERATIONS

There are two key operational issues that purchasers should consider. The first relates to the management of Redstone and the second relates to care of the horses used to take guests into the hunting areas.

(15) The owner of Nahanni Butte is considering selling his operation.

In order to provide continuity and training during the first years of operation, the purchasers could consider hiring Tim or Hugh MacAulay to assist them with management of Redstone. Alternatively, the purchasers could phase in the buying period, thereby keeping Tim and/or Hugh committed. In either scenario, the transitional time period would give the purchasers time to establish a reputation. This reputation is very important, considering that Redstone draws heavily each year from repeat clientele; each year approximately 75 to 85% are repeat clients.

Proper management of the horses is also an important cost factor in the operational budget at Redstone. It is recommended that the horses are not wintered north of Alberta. Prior to the beginning of the hunting season, the horses will need to be transported from Alberta or northern British Columbia by liner to Ross River, then trailed to the base camps. If the purchasers are unfamiliar with horses, at least one horse wrangler should be employed each season (as several of the other operators do) to assist them with the care of the horses. In addition, purchasers have to consider where the horses should be wintered and how they should be transported to the base camp.

5. PRELIMINARY FINANCIAL ANALYSIS

The revenues and operational expenses of Redstone Mountain Trophy Hunts are estimated and projected over a five-year period for the purpose of preliminarily establishing the financial viability of Redstone Outfitters.

In Table 5-1, the revenues of Redstone Mountain Trophy Hunts are presented. The key assumptions on which the projection of the revenues is based are as follows:

- the size and nature of Redstone operation does not change in the first five years after purchase, except to increase the number of clients per season from 25 to 30;
- revenues from package sales increase 12% per annum(16);
- operators net approximately $300.00 per hunting trip, or $1,800.00 per season on the sale of charter flights (the price that guest pays for transportation from Norman Wells is more than the price the airline charges the outfitter); and
- 100% occupancy is projected to continue.

TABLE 5-1
ESTIMATE OF REVENUES
REDSTONE MOUNTAIN TROPHY HUNTS
1988 - 1992
(Canadian Dollars)

	1988	1989	1990	1991	1992
Sale of Packages	165,862	221,116	247,650	277,368	310,652
Sale of Charter Flights	1,800	1,800	1,800	1,800	1,800
Total Revenue	167,662	222,916	249,450	279,168	312,452
Total Guests per Season	25	30	30	30	30

(16) Currently, Redstone prices increase 8-10% per annum. As Redstone prices are approximately 10% lower than the average prices of competitors, a 12% increase is considered feasible.

As indicated in Table 5-1, revenues increase 86% over a five-year period.

A preliminary proforma financial statement and loan payment schedule has been prepared for Redstone Trophy Hunts. The operating and financing expenses are based on the following key assumptions:

Operating Expenses

- Operating expenses increase 6% per annum(17);
- Food costs are estimated at $40.00 per day per guest and staff member in 1988;
- Employee wages in 1988 include salaries for 1 cook and 5 guides that Redstone currently requires as staff each season. In addition it will be written into the agreement for sale that the MacAuley's will assist the new owners during the first year of operation with management and the care of horses;
- After the first year of operation one horse wrangler and a manager are to be hired for each season of operation. The new owners will manage the operation during the off season; and
- All other expenses are based on estimates by present owners.

Financing Expenses

- Purchase price of $412,000, price includes value of capital assets ($312,000) plus $100,000 for the goodwill aspect of the operation;
- Down payment of $41,200, owner contribution is 5% of purchase price or $20,700;

(17) Redstone operating expenses currently increase 4-6% per annum.

- Loan of $371,000 amortized over 10 years at 9.75% interest (see loan payment schedule); and
- Government participation is $20,500 or 5% of purchase price and is received in the first year as "operating subsidy". The application of this subsidy may surface either as a "grant" or as a means of equity participation in the project.

Further details of the proforma financial statement are outlined in the following tables. This preliminary analysis indicates that purchasers of Redstone could make a profit of $14,367 in Year 2 and a profit of $112,823 by Year 5. However, prior to purchasing Redstone the potential buyers should review the audited financial statements of the existing operation and carefully consider the management concerns outlined in this report.

Prefeasibility Study
Redstone Mountain Trophy Hunts
Proforma Financial Statements
[1988-19921

Line items: Year:	1988	1989	1990	1991	1992
Sale of packages	S16S,862	$221,116	$247,650	$277,368	$310,652
Sale of charter flights	1,800	1,800	1,800	1,800	1,800
Total gross sales	$167,662	$222,916	$249,450	$279,168	$312,452
[COST OF GOODS SOLD]					
Food costs for guests	10,360	12,600	13,356	14,157	15,007
Total cost of goods sold	$10,360	$12,600	$13,356	$14,157	$15,007
Gross profit	$157,302	$210,316	$236,094	$265,011	$297,445
[OPERATING EXPENSES]					
Employee wages	23,000	42,880	45,453	48,180	51,071
Employee benefits	3,450	6,432	6,818	7,227	7,661
Staff food expenses	15,120	22,680	24,041	25,483	27,012
Marketing and promotional expenses	5,000	5,300	5,618	5,955	6,312
Professional fees + sundry expenses	2,500	2,650	2,809	2,978	3,156
Utilities + insurance	10,000	10,600	11,236	11,910	12,625
Depreciation expenses	62,433	49,940	39,958	31,967	25,573
Property lease + licence	270	210	270	270	270
Wintering + transportation of horses	20,000	21,200	22,472	23,820	25,250
Staff transportation	1,600	1,696	1,798	1,906	2,020
Total operating expenses	143,375	163,656	160,473	159,696	160,950
Operating income/loss	13,927	46,660	75,621	105,315	136,495
Other income - Startup subsidies[1]	20,500	0	0	0	0
Other expenses-Interest exp. on loan,	34,6S8	32,293	29,690	26,825	23,673
Profit before taxes	(231)	14,367	45,932	78,490	112,823
Taxes-n/a					
Net income/loss	(231)	14,367	45,932	78,490	112,823

Footnotes:

[11 Start up subsidies recognized as 5 % Government participation in 1st year.

[21 Given the profit contribution, length of time required to discharge the loan commitment can be accelerated.

Prefeasibility Study
Redstone Mountain Trophy Hunts
Proforma Financial Statements
[1988- 1992]

Key financial Data & Assumptions:	1988	1989	1990	1991	1992
Revenues will be generated from several sources:					
Guest Data:					
No of Guests	25	30	30	30	30
Revenue generation from guests:	$165,862	$221,116	$247,650	$277,368	$310,652
A 12 % increase assumed in total revenues from 1989 onwards,					
[9-10 week season of operation]					
2 @ 10 day hunts- No of guests	3 * option [a]	10 * option [a]	10 * option [a]	10 * option [a]	10 * option [a]
3 @ 14 day hunts- No of guests	13 * option [b]	15 * option [b]	15 * option [b]	15 * option [b]	15 * option [b]
1 @ 5 day hunt- No of guests	4 * option [c]	5 * option [c]	5 * option [c]	5 * option [c]	5 * option [c]
5 guests per hunt after 1988/30 per season					
Package prices:					
2 hunts @ $4,900 U.S $6,162 CDN.- Option [a]					
3 hunts @ $6,300 U.S $7,922 CDN.- Option [b]					
1 hunt @ $2,700 U.S $3,395 CDN.- Option [c]					
Sale of Charter flights:	$1,800	$1,800	$1,800	$1,800	$1,800
Guests are charged a price that calls					
for operators to net $300 per hunt or $1,800 per season,					
Operating Costs:					
food /Guests :					
1988= 9 wks * 7 days * 4 guests @ $40+					
7 days * 1 guest @$40 =	$10,360				
1989 + = 9 wks * 7 days * 5 guests		$12,600	$13,356	$14,157	$15,007
From 1989 onwards, food costs rise % 6 p/a,					
food /Staff :					
1988= 9 wks * 7 days * 6 staff @ $40	$15,120				
1989 + = 9 wks * 7 days * 9 staff @$40,		$22,680	$24,041	$25,483	$27,012
Staff wages:					
5 guides @ $4000 + 1 cook @ $3000 plus:	$23,000	$42,680	$45,453	$48,180	$51,071
1 horse wrangler [@$3500]+[mgmt fee $15,000]					
Horse wrangler + mgmt fee included from 1989 onwards					
From 1989 onwards ,expenses grossed up by 6 %					
Employee benefits computed at 21% of gross wages.					
Marketing and promotional expenses:	$5,000	$5,300	$5,618	$5,955	$6,312
Professional fees + sundry expenses:	$2,500	$2,650	$2,009	$2,978	$3,156
Utilities + insurance:	$10,000	$10,600	$11,236	$11,910	$12,625
Includes costs in summer and office costs in the winter.					
Depreciation expenses:	$20,000	$16,000	$12,800	$10,240	$8,192
Assumed capital asset holdings of $312,175 ,CCA 20%,					
Straight line on UCC balances o/s..					
Property lease + licence:	$270	$270	$270	$270	$270
Wintering + transportation of horses:	$20,000	$21,200	$22,472	$23,820	$25,250
Staff transportation	$1,600	$1,696	$1,796	$1,906	$2,020
Treatment of goodwill not included.					

Capital Assets Breakdown / Depreciation

U.C.C Pool	1988	1989	1990	1991	1992
fixed Buildings	$231,000	$104,800	$147,840	$110,272	$94,618
Fixed Equipment	$42,000	$33,600	$26,880	$21,504	$17,203
Horses and Equipment	$800	$640	$512	$410	$328
Camp Equipment	$32,375	$25,900	$20,720	$16,576	$13,261
Miscellaneous	$6,000	$4,800	$3,840	$3,072	$2,458
Same CCA rate assumed for all asset classes — Totals	$312,175	$249,740	$199,792	$159,834	$127,867
Depreciation Expenses [cca claim] [Based on UCC balances @ 20 % rate]	$62,435	$49,948	$39,958	$31,967	$25,573

Prefeasibility Study
Redstone Mountain Trophy Hunts
Amortization of proposed Loan
[120 months 1

Assume: Total purchase price of $412,000 /loan of $371,000
5% owner equity * 5 % govt. participation. [at inception]
fur market value of capital assets . $312,175
Therefore, total loan required 071.000 / 20 days used for accrual of interest.
To be amortized over 10 years at 9.75 I interest. [current best customer commercial rate]
Govt's share of 5% equity shown as subsididy the 1st year of operations.
Approximate payments : p/a $4.8 M.

# of months	Principal	Interest Amount	Payment Amount	Payment Applied to Principal
1/1988	$371,000	$2,973	$4,849	$1,876
1	$269,124	$2,958	$4,849	$1,891
3	$367,233	$2,343	44,249	$1,906
4	126S,327	$2,928	44,449	$1,921
S	$262,406	$2,912	$4,849	$1,937
6	$261,469	$2,897	44,849	$1,952
7	$2s9,517	$2,881	$4,849	$1,968
8	$357,549	$2,865	$4,849·	$1,984
9	$355,565	$2,849	$4,849	$2,000
10	1232, 565	$2,833	w, 849	$2,016
11	$31, 550	$2,817	$4,849	S2,032
12	$349,318	$2,801	$4,849	92,04a
13/1989	$247,470	$2,785	$4, 849	$2,064
14	$345,405	$2,768	$4,849	$2,081
15	$343,324	$2,751	$4,849	$2,098
16	4241,227	$2,734	$4,849	$2,115
17	$329,112	$2,718	$4,849	$2,131
:8	$236,931	$2,700	$4,849	12,149
19	$334,832	$2,683	$4,849	$2,166
20	$332,666	$2,666	$4,849	$2,183
21	$330,483	$2,648	$4,849	$2,201
22	$328,283	$2,631	$4,849	$2,218
23	$226,064	$2,613	$4,849	$2,236
24	$323,828	$2,S9S	$4,849	$2,254
25/1990	$321,574	12,$77	$4,849	$2,272
26	$319,302	$2,559	$4,849	$2,290
27	$317,012	$2,540	$4,849	$2,309
2a	$314,704	$2,s22	$4,849	$2,327
29	$312,377	$2,503	$4,849	$2,346
20	4310,031	$2,484	$4,849	$2,365
31	$307,666	$2,466	$4,849	$2,383
32	$305,283	$2,446	$4,849	$2,403
33	$302,880	$2,427	$4,849	$2,422
34	$300,459	S2,408	$4,849	$2,441
3s	$293,017	$2,388	$4,849	$2,461
16	$295,557	$2,369	$4,849	$2,430
27/1391	1233, 076	$2,349	$4,849	$2,500
3a	$290,576	$2,329	$4,849	$2, s20
39	$288,055	$2,308	$4,849	$2, 541
40	$285,515	$2,288	44,649	$2,561
41	1232,934	$2,268	44,049	$2,581
42	$230,372	$2,247	$4,849	$2,602
43	$277,770	$2,226	$4,849	$2,623
44	$275,147	$2,205	$4,849	12,644
4s	s272, S03	$2,184	$4,849	$2,665
46	$269,838	$2,162	$4,849	$2,687
47	$267,151	$2,141	$4,849	$2,708
46	$264,443	$2,119	$4,849	$2,730
49/1992	$261,713	$2,097	$4,349	$2,752
so	$258,961	$2,075	$4,849	$2,774
51	$256,188	$2,053	$4,349	$2, 55
52	$253,392	[illegible]	$4,849	$2, 313
53	$250,573	12, 203	$4,349	$2,841
54	$247,732	$1,985	$4,849	$2,864
55	1244,069	$1,962	$4,849	$2,887
S6	$241 ,982	$1,939	$4,849	$2,910
57	$239,072	$1,916	44,449	$2,333
5a	$236, 129	$1,892	$4,849	$2,957
59	$233,182	$1,869	$4,849	$2,980
60/1993	4220,202	$1,845	$4,849	$3,004
61	$227,198	$1,821	$4,849	$3,028
62	4224,169	$1,796	44,649	$3,053
63	$221,111	$1,772	$4,649	$3,077
64	$218,040	11,747	$4,849	42,102
6S	$214,930	$1,722	$4,849	$3,127
66	$211,811	$1,697	$4,849	$3,152
67	$208,660	$1,672	$4,849	$3,177
68	$203,483	$1,647	$4,849	$3,202
69	$202,281	11,621	$4,849	$3,228
70	$199,053	$1,595	$4,849	$3,254
71	$19s,799	$1,569	$4,849	$3,280
72/1394	$192,s19	$1,543	$4,849	$3,306
73	$189,213	$1,516	$4,849	$3,333
74	$185,880	$1,490	$4, W	$3,359
n	$182,521	$1,463	$4,849	$3,386
76	$179,134	$1,436	$4,849	$3,413
77	$175,721	$1,408	$4,849	$3,441
78	$172,280	$1,381	$4,849	$3,468
79	$168,812	$1,353	$4,849	$3,496
40	$16s,31$	$1,325	$4,649	$3,524
81	1161,791	$1,297	$4,849	$3, 552
82	$158,239	$1,263	$4,849	$3,581
83	$154,658	$1,239	44,649	$3,610
34/1993	$151,048	$1,210	$4,849	$3,629
63	U47,41O	$1,181	$4,849	43,660
66	s143,742	$1,152	$4,849	$3,697
87	1140,043	$1,122	$4,849	$3,127
88	$136,318	$1,092	$4,849	$3,757
89	$132,561	$1,062	$4,849	$3, 787
90	$128,775	$1,032	$4,849	$3,817
91	$124,958	$1,001	14, 849	$3,848
92	$121,110	$971	$4,049	$3,878
93	$117,222	$939	$4,849	$3,910
94	$113,322	$908	$4,449	$3,941
9s	$109,381	$877	$4,849	$3, 372
96/1996	$105,409	$845	$4,849	$4,004
97	I101,4O3	$813	$4,849	$4,036
9a	197,364	$780	$4,849	$4,069
99	$93, m	$748	$4,849	$4,101
100	$89,198	$715	$4,849	$4,134
101	$85,064	$682	$4,849	$4,167
102	$80,897	$648	$4,849	$4,201
103	s76,696	$615	44, 849	$4,234
104	172,461	$581	$4,849	$4,268
:05	$63,193	$S46	$4,849	$4,303
106	463,891	$512	$4,849	$4,337
107	$59,554	$477	$4,849	$4,372
108/1997	$55,182	$442	$4,849	$4,407
109	$s0,775	1407	$4,849	94,442
110	146,333	1371	$4,849	$4,478
111	$41,855	$323	$4,849	14, 514
112	$37,342	$299	$4,849	$4,550
113	$32,792	$263	$4,849	$4, 586
114	$33,206	$226	$4,849	$4,623
115	$23,583	$189	$4,849	{4, 660
116	$18,923	$152	$4,849	$4,597
117	$14,23$	$114	$4,849	$4,735
118	$9,490	$76	$4,849	$4,773
119	$4,717	$38	$4,849	$4,811
120/! 998	($94)	($1)	$4,849	$4,850

6. RECOMMENDATIONS AND CONCLUSIONS

Redstone Mountain Trophy Hunts is a viable and competitive trophy hunting operation. The potential purchasers of Redstone would buy not only the opportunity to market quality trophy hunting packages in a unique and spectacular landscape, but also the potential to market outdoor wildlife, fishing, photography and horse trailing adventures. The results of this prefeasibility study indicate that Redstone Mountain Trophy Hunts has an established reputation, high occupancy rates and repeat visitation, as well as revenues that are increasing significantly each year.

Based on the results of this prefeasibility study, the consultant recommends a purchase price of $412,000, $128,000 less than the asking price of $550,000. The recommended purchase price of $412,000 takes into consideration the estimated value of capita" assets ($312,000) and an additional $100,000 for the goodwil· aspect of the operation.

Assuming a loan of $371,000 with 5% owner equity and 5% governmen: participation the potential buyers could realize a profit of over $14,000 in Year 2 and a profit of over $112,000 in Year 5.

In conclusion, the results of this prefeasibility study suggest that the purchase of Redstone Mountain Trophy Hunts is a viable consideration with potential to both create employment and generate increasing profits over the next five years.

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MacLaren Plansearch (1987) Western Arctic Tourism Strategy Interim Report, Phase 2: Market Analysis, Western Arctic Visitors' Association: Northwest Territories.

LIST OF NORTHWEST TERRITORIES RENEWABLE RESOURCES

CLASS A OUTFITTERS

1. Zone E/l-l

Ray Woodward
Arctic Red River Outfitters Ltd.
Box 1457
Lloydminster, Alberta

(403) 875-0560
(403) 875-8926

2. Zone E/1-2

Gary Koopman
Gana River Outfitters Ltd.
911 Pitcairn Ct.
Kelowna, B.C.
VIX 4E5

(604) 763-0685

3. Zone E/1-3

Stan Stevens
MacKenzie Mountain Outfitters Ltd.
Box 124
Norman Wells, N.W.T.
XOE OVO

(403) 587-2255

4. Zone E/1-4

Stan Simpson
Ram Head Outfitters Ltd.
Box 89
Warburg, Alberta
TOC 2T0

(403) 848-7578

5* Zone E/1-5

Duane Nelson
N.W.T. Outfitters Ltd.
Box 1144
Glenwood, Alberta
TOK 2R0

(403) 626-3279

6. Zone E/1-6

Tim and Hugh MacAulay
Redstone Mountain Trophy Hunts
Box 608
Banff, Alberta
TOL OCO

(403) 762-5241

7. Zone E/1-7

Bob Woodward
South Nahanni Outfitters Ltd.
Box 586
Cardston, Alberta
TOK OKO

(403) 653-2562

8. Zone E/1-8

Greg Williams
Nahanni Butte Outfitters Ltd.
Box 879
Nanton, Alberta
TOL IRO

(403) 646-5768